

Venturelytic Tutorial

How to create custom formula metrics?



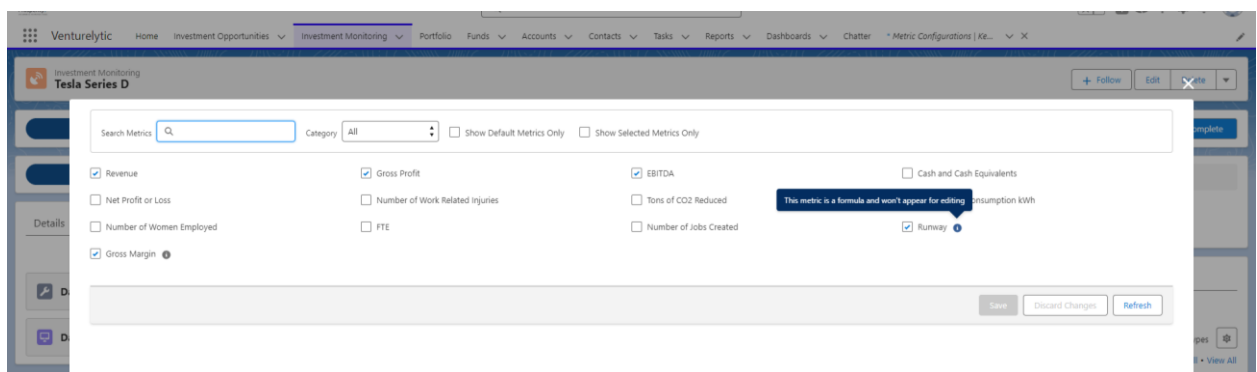
In this manual, we're providing you a step by step tutorial on how to create key metric formula fields for your organization such as the two formula fields shown below (Runway and Gross Margin).

Be aware: this functionality is available to Venturelytic Admins only. Ask you administrator to create theses metrics for you.

1. Goal

END RESULT

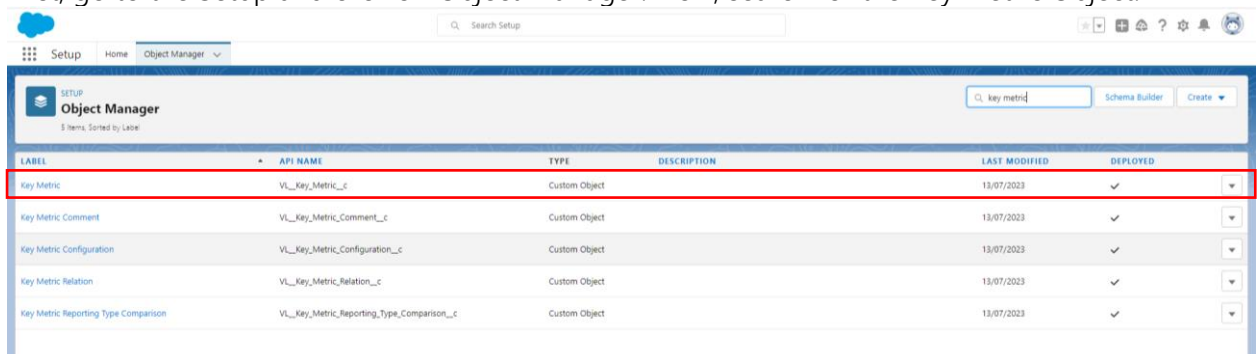
See the screenshot below of the result we want to achieve, a selectable key metric formula that is the result of other "input" key metric fields.



2. Create a Key Metric field in the Back-End

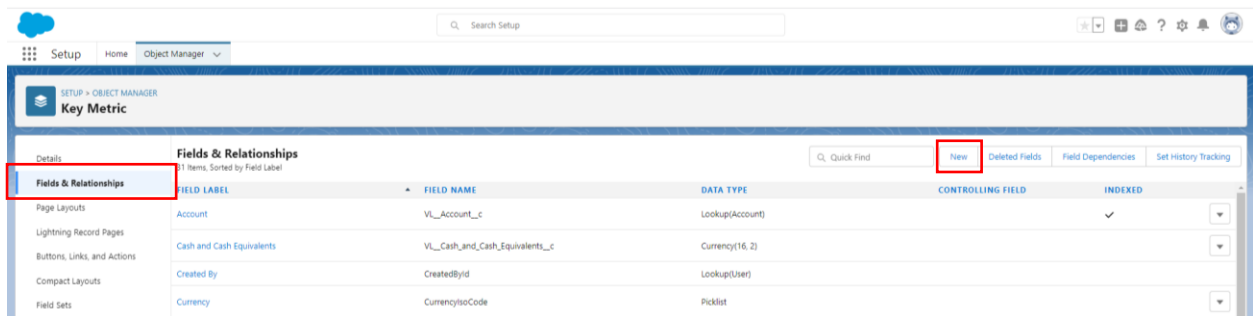
OBJECT MANAGER

First, go to the Setup and click on Object Manager. Now, search for the Key Metric Object.

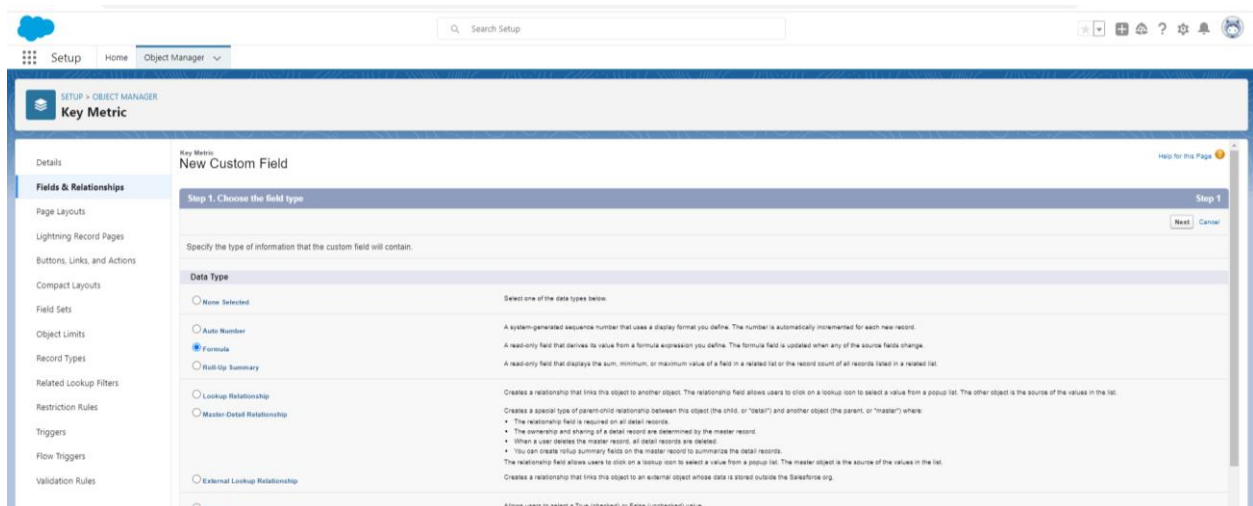


CREATE FORMULA FIELD

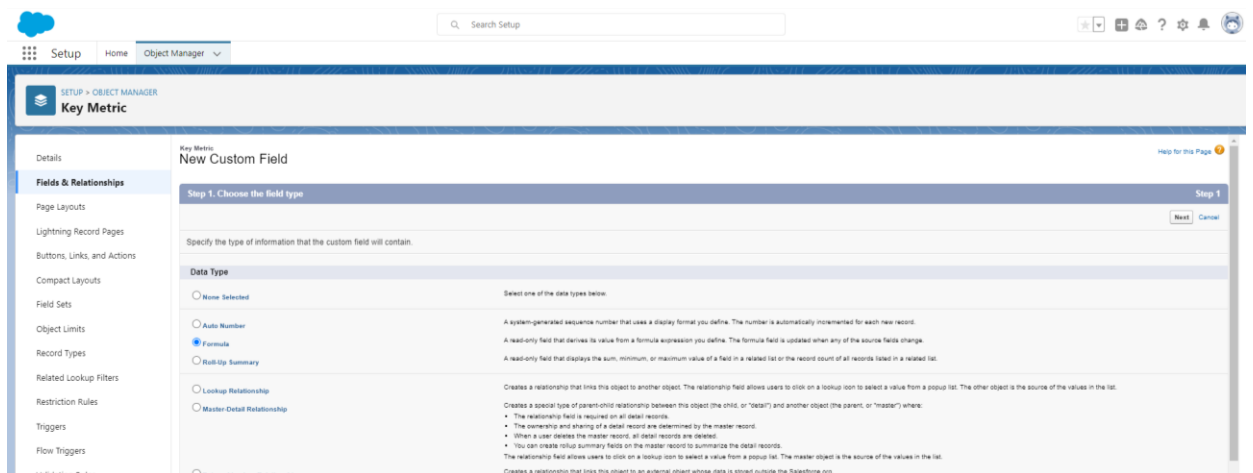
Then, click on the Fields & Relationships tab on the navigation panel on the left hand side. Then, you can click on "New" to create a new field in this object.



Select the "Formula" type and click "Next"

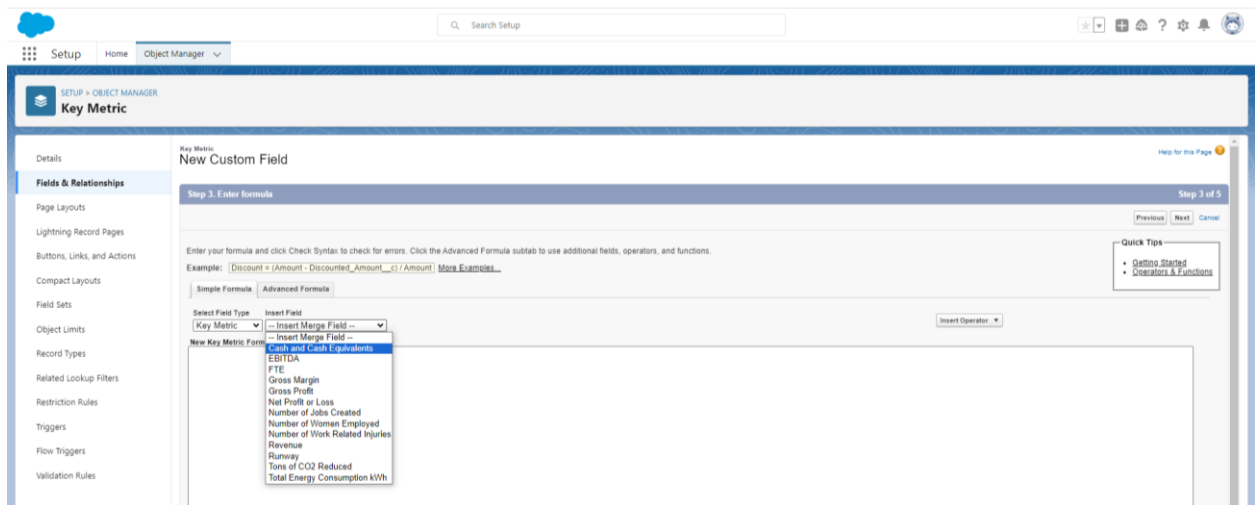


Name the New field and select a formula return type.

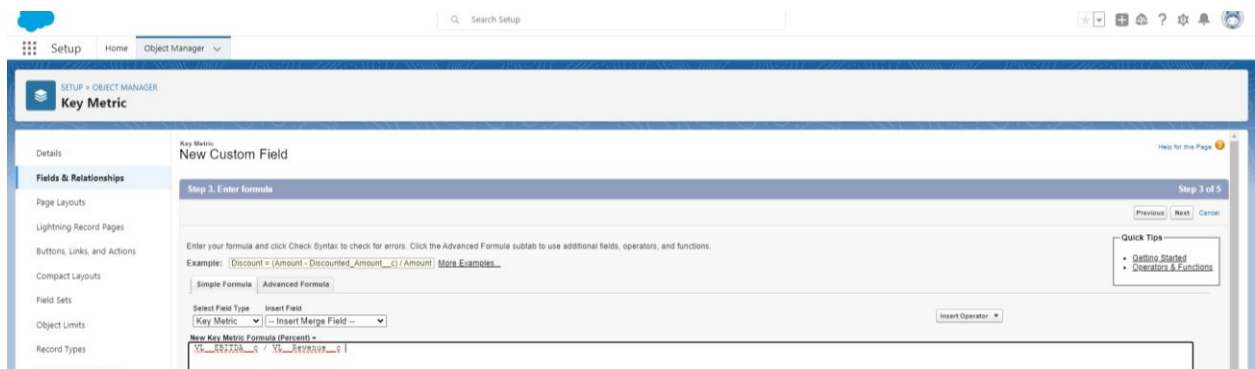


FORMULA BUILDER

Subsequently, select any of the available metrics and insert them as fields in the formula builder below. With the operators available on the right hand side, you can build your own formula.



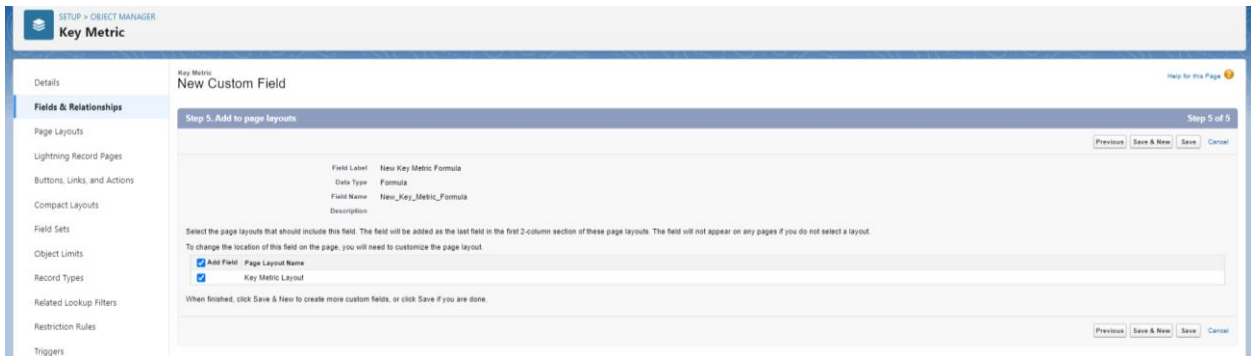
Your result could look something like this:



Click next and decide on which profiles to enable the newly created field:



Make sure the checkbox is checked to add this newly created field on the page layout.

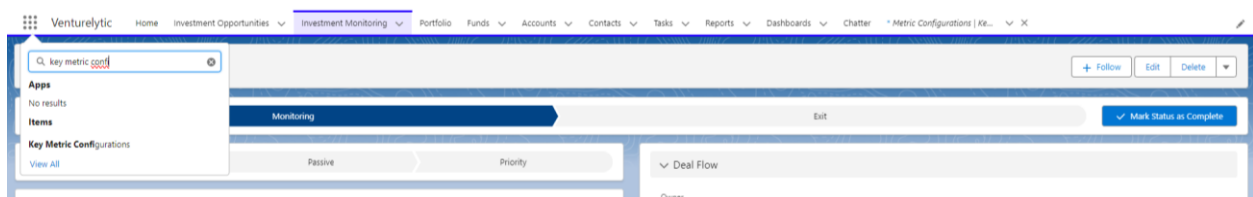


Now, the field is created in the backend. In a next step, we're making this field available in the front end as well to make sure it interacts the way we want with the other Key Metrics.

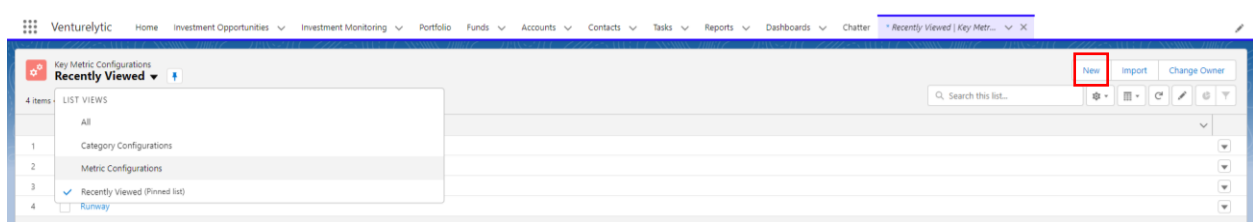
3. Create a Key Metric field in the Front-End

KEY METRIC CONFIGURATION

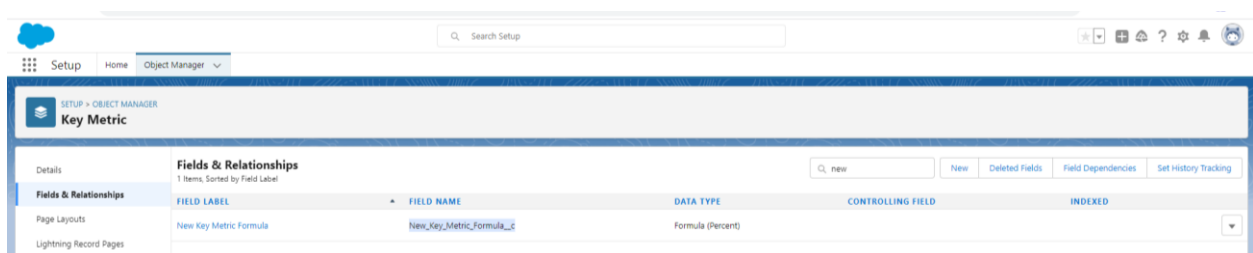
First, search for Key Metrics Configurations via the App Launcher.



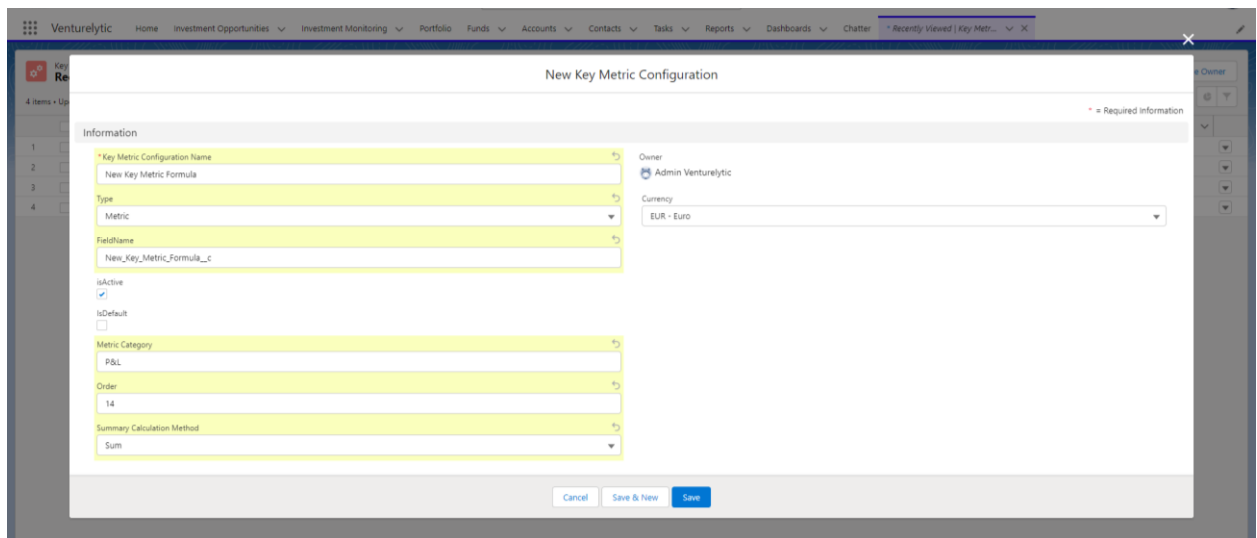
Here, you can change the list view and click on the "New" action button on the right to add the Key Metric in the front-end.



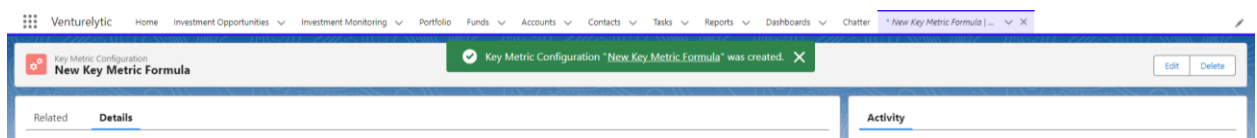
Fill in the details of the Key Metric and make sure to copy the Field Name from the backend into the Field Name field in the front-end.



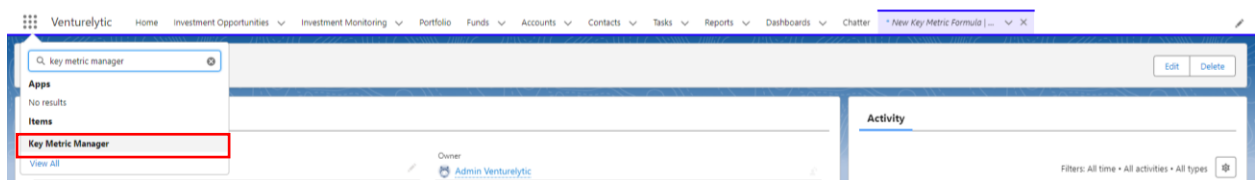
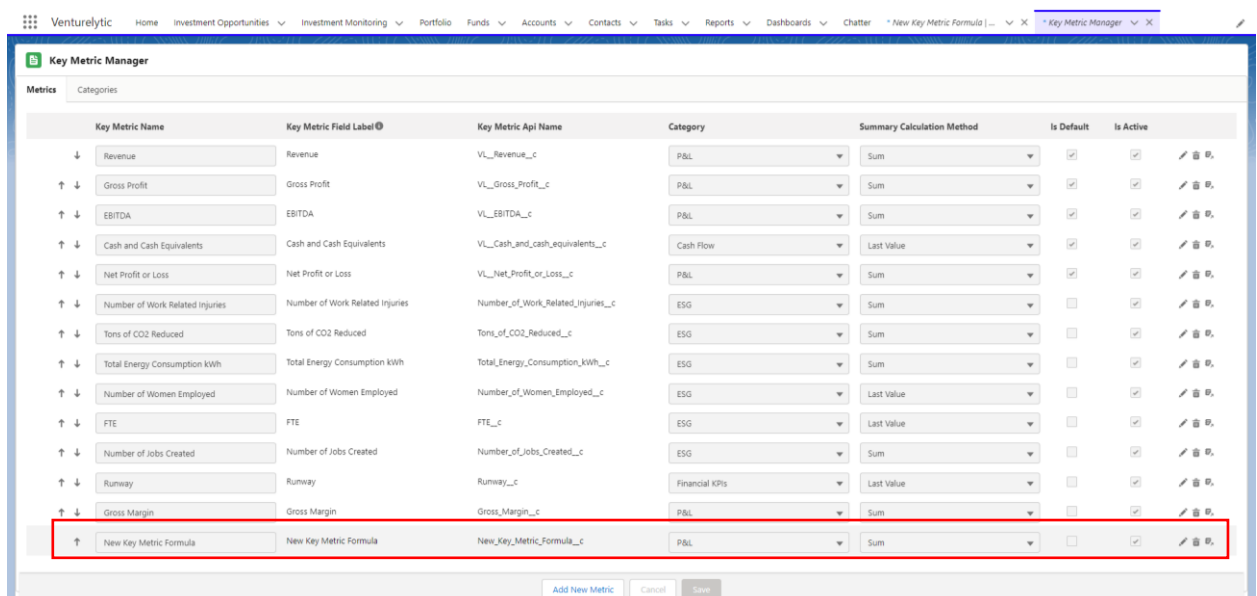
Finally, check if all fields have been filled out correctly and click Save.



You've successfully created the Key Metric in the front-end for your end users.

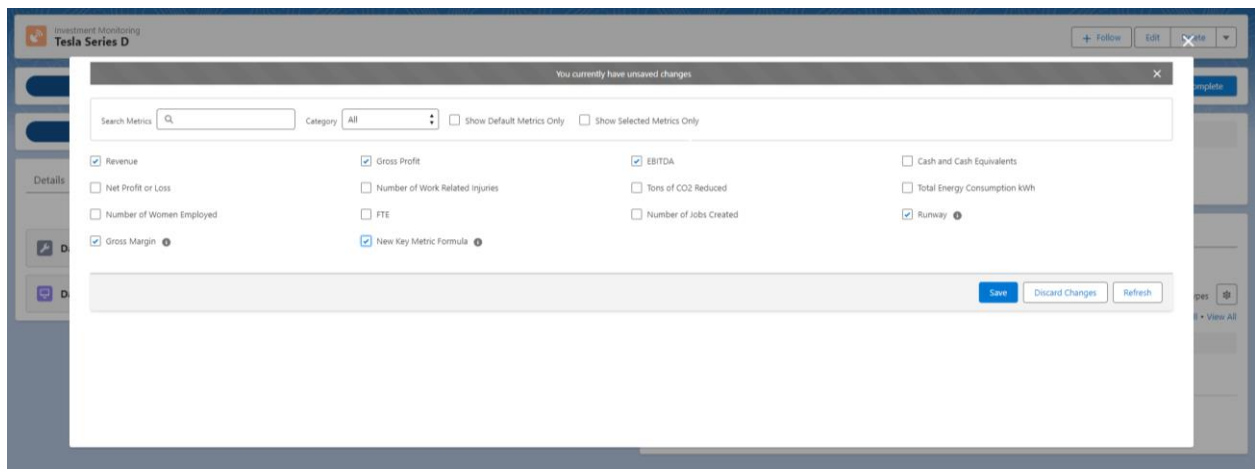


As a check, navigate to the Key Metric Manager page to see whether the order and the characteristics are in line with your expectations.

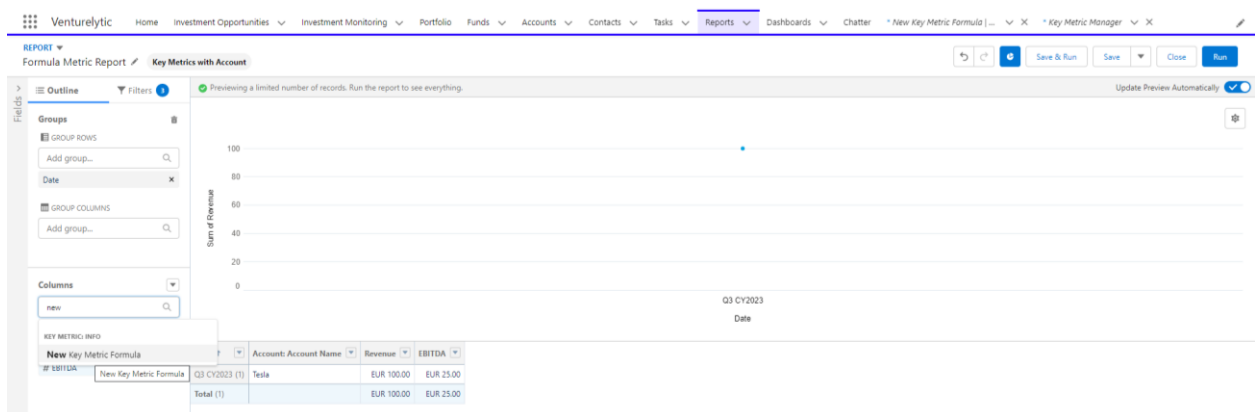



Key Metric Name	Key Metric Field Label	Key Metric Api Name	Category	Summary Calculation Method	Is Default	Is Active
Revenue	Revenue	VI_Revenue_c	P&L	Sum	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gross Profit	Gross Profit	VI_Gross_Profit_c	P&L	Sum	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EBITDA	EBITDA	VI_EBITDA_c	P&L	Sum	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cash and Cash Equivalents	Cash and Cash Equivalents	VI_Cash_and_cash_equivalents_c	Cash Flow	Last Value	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Net Profit or Loss	Net Profit or Loss	VI_Net_Profit_or_Loss_c	P&L	Sum	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Number of Work Related Injuries	Number of Work Related Injuries	Number_of_Work_Related_Injuries_c	ESG	Sum	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Tons of CO2 Reduced	Tons of CO2 Reduced	Tons_of_CO2_Reduced_c	ESG	Sum	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Total Energy Consumption kWh	Total Energy Consumption kWh	Total_Energy_Consumption_kWh_c	ESG	Sum	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Number of Women Employed	Number of Women Employed	Number_of_Women_Employed_c	ESG	Last Value	<input type="checkbox"/>	<input checked="" type="checkbox"/>
FTE	FTE	FTE_c	ESG	Last Value	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Number of Jobs Created	Number of Jobs Created	Number_of_Jobs_Created_c	ESG	Sum	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Runway	Runway	Runway_c	Financial KPIs	Last Value	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Gross Margin	Gross Margin	Gross_Margin_c	P&L	Sum	<input type="checkbox"/>	<input checked="" type="checkbox"/>
New Key Metric Formula	New Key Metric Formula	New_Key_Metric_Formula_c	P&L	Sum	<input type="checkbox"/>	<input checked="" type="checkbox"/>

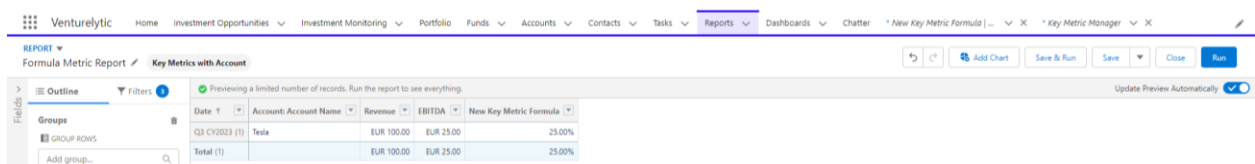
Now, you can select the Formula Key Metric for your Investment of interest, by clicking on the Key Metric tab under either your Investment Opportunity page or your Investment Monitoring page.



In a last step, you can add this new formula metric to your reports:



From now on, all new inputs on the “input metrics” will result in a new value on your formula metric.



We hope this manual helped you with the creation of a new formula metric. For more information, make sure to contact us via our [Customer Success Portal](#).

